

Invoice Header

The screenshot shows the 'Invoice (Customer): T-79' form. Key fields include:

- Client:** Sandbox
- Organization:** Manufacturing Discrete
- Order:** 50446_10/11/2023
- Date Ordered:** 10/11/2023
- Document No:** T-79
- Order Reference:** (empty)
- Description:** (empty)
- Target Document Type:** AR Invoice
- Date Invoiced:** 10/11/2023
- Account Date:** 10/11/2023
- Business Partner:** Tech equipment
- Partner Location:** Coimbatore
- User/Contact:** (empty)
- Place of supply:** (empty)
- Price List:** Sales Price List
- Currency:** INR
- Sales Representative:** Discrete User
- External Agency:** (empty)
- Payment Rule:** Cheque
- LLR Number:** (empty)
- Is Payment:**
- Create lines from:** (button)

The screenshot shows the 'Reference' and 'Status' sections of the invoice form.

Reference:

- Project:** (empty)
- Place of supply:** (empty)
- Campaign:** (empty)

Status:

- Total Lines:** 0.00
- Grand Total:** 0.00
- Document Status:** Drafted
- Document Type:** ** New **
- Pay Schedule valid:**
- Cash Plan Line:** (empty)
- Generate Withholding:** (button)
- Withholding Amount:** 0.00
- Is Fixed Asset Invoice:**
- Document Action:** (button)

Critical Fields:

- Business Partner:** We can select existing/new customers here and this field used to maintain the customer
- Partner location:** This field is updated automatically, based on business partner selection, and also updates the site manually
- Price list:** The price list will be selected in the product master once we choose the product price list will display automatically and the user also select manually
- Payment Rule:** This field used to select the payment type
 - Cash:** After receiving the invoice, the customer pays the invoice amount through cash only

- 4.2 Check: After receiving the invoice, the customer pays the invoice amount through a check
 - 4.3 Credit Card: Payment amount paid to vendor to use Credit Card
 - 4.4 Direct Debit: Payment amount paid to direct vendor account number
 - 4.5 Mixed POS Payment
 - 4.6 NEFT
 - 4.7 On Credit
 - 4.8 RTGS: Payment amount paid to RTGS
 - 5. Payment term: The terms of payment (Immediate, 30 days, etc)
 - 6. Sales representative: This field updates automatically based on system login through the user name
 - 7. Order: Once the sales or shipment document number is selected and saved, the document number is updated automatically
-

Critical & one-time setup fields:

- 1. Organization: This field is used to select the organization
 - 2. Target Document Type- This Field is used to select the type of document that you are going to process
-

Non-Critical Field:

- 1. Order: This field is used to complete an invoice transaction using a Sales order reference. We can simply paste the sales order document number or choose the sales orders that need to be invoiced.
- 2. Order Reference: Notes, Document, and Important Information for this Order.
- 3. Description: Used to describe specifics about an Invoice document or any other note, information, or data, for example.

4. User contact: He is the contact person on that particular vendor side.
 5. Place of supply: Where should the despatch material/item/products be delivered(As stated by the states)
 6. Project: If this order is processed against a project user can tag the project for tracking.
 7. Campaign: Campaign Details of the project are processed against the order
 8. Cash plan line: It is a master that is used to maintain a particular cash plan for this particular order.
 9. Discount Printed Checkbox (Invoicing): To print Discount Details on Report
 10. Ispayment: select this checkbox to generate the payment from the invoice expense window.
 11. Bank Account: select the bank account number to do the payment
 - 12.External Agency : It is used to select the existing business partner name.
-

Serial number/Lot number (ASI):

Zoom condition:

1. Shipment customer
 2. Sales order
 3. Receipt
 4. Service Request
 5. View TDS
-

Customization:

1.Ctreate lines From Customer DC :

1. The Create lines From Customer Dc Button is used to select the Data from the Customer Material DC Outgoing Transactions.
 2. In this form we have 2 filter options like Date and the Outgoing Dc Product.
 3. Service Product For Outgoing Product Should be maintained in the Product Master Related Product Tab.
 4. By Using this Option We can Directly Create Invoices For the Customer Material DC Services Charges without the Sales Order References.
-

Revision #26

Created Fri, May 1, 2020 7:21 PM by [Harishprabu G](#)

Updated Wed, Apr 2, 2025 10:55 AM by [Prasanth P](#)